

Summary of IRP Changes

Historic IRP Regulations

IRP Criteria

- Identification and comparison of all practicable energy efficiency and energy supply resource options.
- Include action plan covering minimum period of five years.
- Designate least-cost options.
- Describe efforts to minimize adverse environmental effects of new resource acquisitions.
- Provide ample opportunity for full public participation.
- Include load forecasting.
- Provide methods of validating predicted performance to determine whether IRP objectives are being met.

Alternatives to IRP

- **Small customer plan** – Utilities and end-users under 25 GWh in sales/use, but not members of MBAs or JAAs. Reduced data collection and reporting requirement. Initial plan, annual letter.

Other Notable Changes

- Exception for state-regulated IOUs no longer applies.
- IRP now respects proprietary information—just give summaries, other info/data available upon request.
- Definition of and references to least-cost option deleted to clarify that customer is free to pursue renewables and energy efficiency even if other resources appear less costly.

Revised IRP Regulations

IRP Criteria

- Identification and comparison of all practicable energy efficiency and energy supply resource options.
- Include action plan with timing set by customer.
- Describe efforts to minimize adverse environmental effects of new resource acquisitions.
- Provide ample opportunity for full public participation.
- Conduct load forecasting.
- Include brief description of measurement strategies for options identified in IRP to determine whether objectives are being met.

Alternatives to IRP

- **Small customer plan** – Utilities under 25 GWh in sales/use, including members of MBAs and JAAs; all end-use customers. Reduced data collection and reporting requirement. Initial plan, annual letter.
- **Minimum investment report** – Customers required under State, Tribal, or Federal regulation to make a mandated minimum financial/resource investment in DSM or renewable energy programs or initiatives. (i.e. California’s 2.85%). Initial report, annual letter.
- **Energy efficiency/renewable energy (EE/RE) report** – State, Tribal, or Federal end-use customers required under State, Tribal, or Federal mandated EE/RE reporting program (i.e. Federal Executive Order 13123). Initial report, annual report.

Annual Reports still required

Once an IRP, or any of its options, is approved, an annual report must be submitted on the anniversary of the plan’s or report’s initial approval. You may continue to use the IRP annual reporting spreadsheet as in the past or any report submitted to another entity with jurisdictional authority over your program. A letter citing progress made under a minimum investment report or small customer plan is appropriate. You must also advise Western of any changes to the action plan at that time. Western uses information from these annual reports for our report to Congress on actions our customers take to use energy wisely. Therefore, it is important that you provide us *with information identifying annual energy and capacity savings associated with DSM, if known, or benefits derived from investments in renewable resources development or research.*

Further Information

Additional information is available from your Regional Energy Services Representative or at Western’s Energy Services web site at www.es.wapa.gov.

• Colorado River Storage Project:

David Bennion, Salt Lake City, Utah, (801) 524-5506

• Desert Southwest Region:

Steve Szarka, Phoenix, Ariz., (602) 352-2462

• Rocky Mountain Region:

Peggy Plate, Loveland, Colo., (970) 461-7227

• Sierra Nevada Region:

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Integrated Resource Planning

CRITERIA



The Energy Policy Act (EPA) of 1992 requires all Western Area Power Administration customers to submit integrated resource plans to Western every five years, with progress reports submitted annually. Western recently revised those guidelines in May 2000, after a formal public involvement process. This brochure describes those changes and what your options are for meeting the requirements of EPA.

The full text of the Energy Planning and Management Program and the Revised guidelines can be found on our web site: www.es.wapa.gov, under the ‘integrated resource planning’ tab.

Several IRP options are available under the new rule. Customers may submit IRPs individually, or if a customer is a member of a member-based association or is served by a power supplier, that entity may submit an IRP on behalf of a customer. They may also submit one cooperative IRP on behalf of all members. Tribal customers are subject to the IRP Rule and can achieve compliance through participation in a cooperative IRP jointly submitted by the power supplier and the Tribe. Cooperative IRPs must specify the responsibilities and participation levels of individual members and the power supplier.

The reporting requirements for an IRP have been simplified and some information which may be considered proprietary now does not have to be included. For example, we no longer require customers to provide a load forecast, only a brief summary that one was conducted.

Three alternatives to an IRP are available.

Minimum Investment Report (MIR)

Customers who are required by State, Federal or Tribal law to invest a portion of their resources in demand-side management (DSM) initiatives, including energy efficiency and load management, and/or renewable energy activities can now provide a copy of that report in lieu of an IRP. This investment is also referred to as a public benefits charge.

Customers may submit a request to prepare a minimum investment report. These reports also may be submitted by member-based associations on behalf of the MBA or its members and by IRP cooperatives on behalf of participants.

A minimum investment report must include:

1. Customer name, address, phone number, e-mail, and contact person;
2. Source of the requirement (number, title, date, and jurisdiction of the law or regulation);
3. Description of the minimum investment, including:
 - Percentage or other minimum requirement for DSM and/or renewable energy, including charges to be collected for and spent on DSM, renewable energy, efficiency or alternative energy related research and development, low-income energy assistance or other applicable public benefits categories;
 - Actual or estimated energy and/or capacity savings resulting from these investments, if known;
 - Actual or estimated energy and/or capacity added from investing in renewable energy, if known;
 - A description of the DSM and/or renewable energy activities to be undertaken over the next 2 years.

Energy Efficiency and/or Renewable Energy Report (EE/RE Report)

End-use customers may submit a request to prepare an EE/RE Report. An EE/RE Report is based on a mandate by a State, Tribal, or Federal Government to implement energy efficiency and/or renewable energy activities within a specified timeframe, for which there is also an associated reporting requirement. (Federal Executive Order 13123 is an example of an EE/RE Report.) The report may include actions taken to reduce uses of water, natural gas and other fossil fuels, as well as electricity.

EE/RE Reports must include:

1. Customer name, address, phone number, e-mail, and contact person;
2. The source of the EE/RE reporting requirement (number, title, date, and jurisdiction of the law or regulation);
3. The initial, annual, and other reporting requirement(s) of the report;

4. A summary of the EE/RE report’s required data or components, including documenting energy efficiency or renewable energy activities.

Small Customer Plan

Small customers may request authority to submit a Small Customer Plan (SCP) instead of an IRP. Requests from electric utilities must include data on total annual energy sales and usage for the previous five years. Requests from end-use customers must only document that the customer does not purchase electricity for resale.

The SCP option is now available to all customers with annual sales/usage of less than 25 gigawatt hours annually, regardless of their association with a joint action agency or member-based association.

Small Customer Plans must:

1. Consider all reasonable opportunities to meet future energy services requirements using DSM techniques, renewable energy resources, or other programs to provide retail consumers with electricity at reasonable cost;
2. Minimize to the extent practical, adverse environmental effects;
3. Provide, in summary, the following:
 - Type of customer;
 - Customer name, address, phone number, e-mail, and contact person;
 - Current energy and demand profiles and data on total annual energy sales and usage for the previous 5 years for utility customers, or energy and demand use for end-users;
 - Future energy services projections;
 - How items in 1 and 2 above were considered;
 - An action plan fitting with the customer’s planning time-frame.